Real-Time with Transformation Station for Applied TAM

Real-Time provides a link between your agency's and the carrier's system. The "Rate" feature gives the agent user the ability to quote new business by utilizing the Transaction Option of Rate to bridge over ACORD application information.

Currently, CompWest has the ability to offer real-time rating.

The **Rate** transaction will bridge your application into CompWest's eLink system for new business quotes. It will pre-fill as many fields as possible leaving only a few additional items that must be validated or entered to calculate the premium.

There are 4 main items you must update to use these features:
1. Policy number format
2. Agent Code
3. NAIC Code
4. Transformation Station update/security setup

Policy Number Format **for real-time inquiries (Coming Soon)
Policy number is the main item used to match documents in the CompWest System.
The policy number format utilized is the prefix and main 7 numbers with <u>no spaces</u>.

Example: WCV5012345

Agent Code and NAIC Codes

From the Applied system, select Clients and Files. From the Drop Down, select Companies.
A list of Companies will appear. Select CompWest.

Make sure your agency code is entered in the following formats 5012345 (this information can be found on a policy dec page) and the NAIC code: 12177

Make sure your agency code is entered, and the NAIC code: 12177

Click on **Options**

Select Agency codes.

You must enter your agent code in for: Code, Password and Contract.

Click **Update**

To close the window Click **Cancel**

Transformation Station Update/Security Setup

Select the Real-Time Interface icon.

From the top left corner, select File and Account Update Wizard. This will run an update for Transformation Station.

You must then select CompWest and assign a company code. Use this code to update CompWest Workers' Compensation (for the Rate feature).

Select **Finish** to complete the process
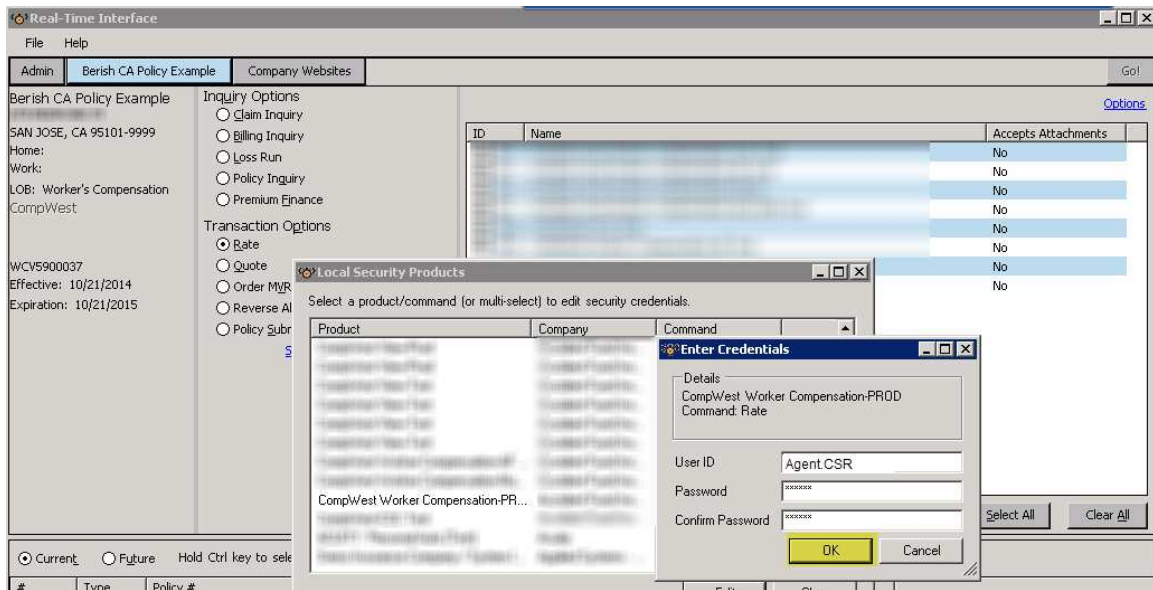
Select the Real-Time Interface icon.

From the top left corner, select File and Local Security Products.

Select (highlight) CompWest and click on **Edit**.

You must enter your user id and password.

Click **OK** to complete the process.

Click **Close** to close the Local Security Products window.

If you need assistance, or have questions, please contact the IT Service Center at:
Phone: 517-708-5700
Toll Free: 866-206-5851